The Growth of an Agile Coach Community at a Fortune 200 Company

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Abstract

Adopting Agile takes courage, perseverance, and continued reinforcement. To meet these needs, a community of Agile Coaches organically emerged at Capital One to provide support and mentoring for projects and organizations seeking to adopt Agile. The community has evolved into an influential body of change agents, which routinely meets to address team or organizational initiatives in Agile projects across the enterprise. By creating an environment where true community can exist and grow, we have added sustainability to our Agile adoption processes and enabled continuous innovation of practices and principles.

1. Background

Agile adoption at Capital One started in early 2004 and was brought about by a desire to decrease IT project delivery time to market. Through rapid growth and diversification, the company had evolved to a place where we needed to spend more time on process and coordination, without sacrificing value to business customers. It was at this point that senior leadership across operations and IT began exploring options and ultimately decided to pilot Scrum as the project management framework paired with Lean software development in hopes of improving time to market.

Pilot projects were conducted in many areas of the company. Each pilot had an external Scrum coach paired with a Capital One associate coach. The pilots showed great success and had high management support and interest. Feedback from the teams involved with the pilots showed a strong interest in continuing to work using Agile with a subsequent increase in morale among the participants.

After the success of the pilot projects, executive management was supportive of implementing Agile on a broader scale at Capital One. Many divisions established Agile teams, projects and portfolios. Gradually, Agile gained ground as the predominant process to deliver IT

projects. Work areas were rebuilt in order to make team rooms and collaborative spaces. Today at Capital One, Agile is used to deliver a majority of the projects within the portfolio.

2. Building the Agile Coach Competency

The adoption of Agile at Capital One created a need for Agile coaches. During the early pilots, the Agile coach competency mainly existed with our external consultants. It became obvious early on that if adoption of Agile was expected to grow, there needed to be an investment in the internal development of associates as part of a coaching competency. The first internal Agile coaches were a group of passionate, committed people who volunteered to fill this role. Current job role was not a consideration, and the initial population came from a variety of job roles – project managers, business systems analysts, testers and developers. These were people who were interested in process and had understood the importance of leading people as part of success. To start their learning, these internal Agile coaches, also called apprentice coaches, were paired with mentor coaches. Mentor coaches at this time were exclusively external consultants. An early success factor of growing Agile coaching internally was the commitment and support of many people on our management teams. Apprentice coaches were allowed the time to learn the role and build the competency. It was acknowledged that Agile coaching was a full-time position with Associates stepping away from their previous role, and that this was a long term investment on behalf of developing a sustainable adoption of Agile.

As apprentice coaches developed, there were varying determinations on when an apprentice coach was ready to be go on his/her own – primarily it was a consideration of education and experience. Therefore, we placed structure around the coach development process and used the concept of "certification." The pilots provided us insight that the CSM (Certified ScrumMaster) class was not enough to say that an apprentice coach was ready to lead a team or start up a new project. There were elements of both education and experience that needed to be proven before an apprentice coach could stand on their own.

While the class provided sufficient foundational education, an assessment of experience criteria came from the mentor coach and the specific project team.

The first set of Agile coaches were officially internally certified in September of 2005, a little over a year after the first pilots at Capital One were initiated. Since that time, we have continued to have interest and identify candidates, leading to 3-5 coaches being certified every few months. As we work through the certification process, we take time to learn, inspect, and adapt as part of a retrospective on areas of success and opportunity. Feedback is consistently used and the process and requirements have been refined several times.

As stated previously, the CSM class is the foundation for the certification process. After attending the class, an apprentice coach is paired with a mentor coach for a period of three to six months. During this time an apprentice will work with their mentor to learn and practice all of the Agile techniques – daily scrum, retrospectives, planning meetings, as well as strengthening facilitation skills for having team and individual conversations. Also, they are expected to be observed by and get feedback from other coaches at Capital One.

In addition to the basics of the certification process, training for the coaches was further strengthened by bringing in outside experts to help broaden the learning experience for the apprentice coaches. Capital One brought in leaders in Scrum early on to help support the growing Agile efforts. It was a great way to support the early growth and development for apprentice coaches.

This certification program has built mentor coaches who can then take other apprentice coaches along the same learning path. Not only has the establishment of internal Agile coaches increased the rate of Agile adoption, but it has reduced the company's dependency on external expertise.

3. Emergence of a Community

The broad adoption of Agile for facilitating software development has led to initiatives and teams that are spread across the company. Some Agile coaches have the opportunity to work closely with others given multiple teams in the same department, while others are the sole coaches for their area. Early on, the coaches relied on their own interest and passion to develop the role by reaching out to each other to build relationships, share experiences and provide support. However, these relationships did not extend far beyond a local level. A number of coaches saw the need to formally create an environment that would encourage learning, provide support, and extend the influence of Agile learning.

From this identified need, the Agile coach community was born. The community has both formal and informal components. Formally, the community is supported by a team within the organization that consists of experienced Agile coaches who have shown the ability to serve as organizational change agents and work across multiple domains. This program team works with both management and the community to articulate the Agile vision and goals for a particular year, as well as move community ideas forward. There is a formalized reporting structure with goals and results oriented around Agile. Informally, the community is open to any and all Agile coaches, including apprentices, that want support or to contribute to the growth of Agile at Capital One. Participation in the Agile community is completely voluntary.

In early 2006, driven by action from an Agile Open Space, weekly Agile Community meetings were established. Two meetings a month are focused on the Agile community. This is open to any one involved or interested in Agile: coaches, team members, management. The agenda for this meeting is created ad hoc at the beginning of the meeting and anyone can contribute. Another meeting during the month is the Agile coach brown bag, which furthers coach learning. Topics have included automation, organizational change, off shoring and Agile, retrospectives, and goals and visions for a particular year or quarter. Finally there is an Agile coach breakfast – a casual pull up time for coaches to get together to talk about whatever is on their mind. It is important to emphasize that this community, and the subsequent meetings and sharing within it, was brought together by passionate people and fully supported, but not mandated, by management.

4. Community Actions

Not only is the Agile coach community a place of support and learning for coaches, it is a driving force for Agile initiatives throughout the company. Some examples of these initiatives are:

1) Agile 101 - We have developed a basic training for coaches to use to help teach teams or interested individuals about Agile. This coach facilitated course is an offering through our training department and is extremely helpful in educating corporate customers and

support roles on how software is developed and value delivered. The demand for this class in 2007 has tripled.

2) Open Spaces - An Open Space is essentially a self-organizing conference where the agenda and topics are set by the people who attend. The community has organized three Open Spaces offered to all of Capital One. The Open Spaces have been the source of several community driven initiatives, as well as providing opportunities for people to share experiences with Agile from all over the company.

3) Review of controls – Being in a highly regulated industry, projects at Capital One must adhere to an extensive list of policies and controls. Agile coaches have stepped up to help map Agile practices back to these policies and controls, so that projects can be well-managed without slowing down the value delivery.

4) Agile Health Checks - This was a community-created tool to help teams determine if, in fact, they are an Agile team and if so, what the relative strength of Agile techniques being used by the team is at that time. The health check came about due to concerns that the rapid adoption of Agile at Capital One might compromise the quality of Agile being practiced. The community wanted to make sure that the Agile efforts in each department or division were true to principles and practices.

5) Support of the Agile coach certification process – The Agile coach community is what drives this process. Certified Coaches are asked to come and observe apprentice coaches that are working towards certification.

In addition to these specific efforts listed, the community is a place where coaches can make offers and ask for help. We talk about happenings in the company and see where we can insert ourselves in order to influence processes and decision making.

5. Challenges

While we have made tremendous progress with our adoption of Agile, we still face challenges. Challenges such as maintaining the quality of Agile projects and coaches, keeping associates motivated and rewarded as part of an Agile coach job role, and meeting the demand of rapid growth of Agile in the company are a few examples.

As the demand for Agile projects grow, so does the demand for people who can fill the Agile coach positions. The number of Agile projects and apprentice coaches is out pacing the number of mentor coaches. Many people being put in the apprentice coach position are more accustomed to traditional project practices. These factors contribute to apprentices potentially gaining the wrong type of experience to enable them to be an effective coach. In order to ensure that coaching standards are maintained at Capital One, the community enforces the internal coach certification process and works with management on expectations of an apprentice coach. The Agile certification process has been expanded to include certified Agile coaches observing the apprentice in various situations – leading a stand up, facilitating a retrospective, or helping with a planning session - and providing feedback. In addition, the coaching community provides learning forums, such as Open Space, and is exploring the process to further formalize the coach job role with management's support and understanding of the role's expectations.

The success of Agile development has created the desire that more projects within the portfolio be delivered in an Agile manner. Many managers in the company are anxious to start Agile projects in their department without an appreciation of the need for initial investment in the coach position. Our more experienced coaches continue to consult management to help them understand the investment necessary to build the coach competency and ultimately be successful in their Agile development. The continued delivery of this message is critical to ensure that management continues to invest in coaching, whether it is staffed internally or they enlist external help to develop internal coaches in their respective areas of the organization. The foundational support of high-quality, experienced coaches will be critical for maintaining current delivery and building competency for the future.

6. Results Achieved

The process of developing Agile at Capital One has taken a significant effort to make the great strides that have been realized so far. Through the focus and hard work of many people, here are some of the results we have experienced from the Agile coach perspective:

- Considerable number of internally certified coaches
- Established apprentice coach pipeline
- Project governance requires that all Agile projects must have a certified Coach
- Establishment of a community of Agile coaches committed to learning, sharing best practices and information, and growing in the coaching competency in order to benefit the teams
- Strong performers have stayed in the coach role

- Continued executive support for coach community and role
- Agile coaches are seen as influential leaders
- Entire organizations transformed to an Agile delivery model
- Coaches are driving key Agile learnings – performance management, audit controls, contracts with suppliers, remote workers

We continue to find areas of our traditional processes that create friction with the Agile delivery model. We have numerous efforts underway to ensure that our traditional processes work in harmony with our Agile processes and our coach community is often viewed as the "customer" of this work. Most of our strategic initiatives this year are being delivered with Agile and our more experienced coaches are providing consulting on how large programs are structured to accelerate time-to-market.

Another key result that our coach community is supporting is the expansion of Agile into non-IT projects. Our business customers have embraced Agile in such a way that they are driving the expansion across the entire value stream. This in itself has created questions on what a non-IT Agile team "looks like" and how to coach a non-IT project. Our Agile coach community is working with these teams and business leaders to answer these questions.

7. Summary

Agile entered Capital One with strong executive-level support. However, it has been the grass-roots passion and effort that has sustained the growth and the success of Agile. Not only Associates, but contractors and other employees have grasped onto Agile as a new way to do their work, not just as another project methodology.

Organizational change takes time. When you are in the middle of change, it is difficult to see the change occur and it never moves as fast as you would like. This is exactly where our Agile Coaches reside – right smack in the middle of organizational change. The adoption of Agile lowers the water in the pond and exposes all the large boulders that you have never seen before or purposefully ignored. These boulders cannot be moved by one individual and perhaps not even by several individuals. It takes a collective group of engaged, committed and courageous people to move the big boulders that will sustain organizational change. This collective group for Capital One has been the Agile Coach Community.

"Never doubt that a small group of thoughtful citizens can change the world. Indeed, it is the only thing that ever has" - Margaret Mead

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